



Filing ID #10023312

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Julie Lynn Oliver
Status: Congressional Candidate
State/District: TX25

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/15/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alphabet Inc. - Class A (GOOGL) [ST]		\$1,001 - \$15,000	None		
Alphabet Inc. - Class A (GOOGL) [ST]		\$1,001 - \$15,000	None		
Alphabet Inc. - Class A (GOOGL) [ST]	SP	\$1,001 - \$15,000	None		
Alphabet Inc. - Class A (GOOGL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	DC	\$1,001 - \$15,000	None		
Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	None		
Amazon.com, Inc. (AMZN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
American Tower Corporation (AMT) [ST]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Apple Inc. (AAPL) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Apple Inc. (AAPL) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
AT&T Inc. (T) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ AF EUROPAC GROWTH R6 (RERGX)09/19/2014 [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ AF NEW PERSPECT R6 (RNPGX)09/19/2014 [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ FID 500 INDEX IPR (FXAIX)06/27/2013 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ Fid Blue Chip GR K (FBGKX) 12/12/2008 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ FID DIVSFD INTL POOL 03/31/2017 [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ Fid Low PR Stk Pool 03/31/2017 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ FID REAL EST IDX INS (FSRNX)11/15/2017 [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ TRP NEW HORIZONS I (PRJIX)12/03/2015 [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ VANG CAP OPPS ADM (VHCAX)09/19/2014 [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ VANG PRIMECAP CORE (VPCCX)09/19/2014 [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
VANG SM VAL IDX INST (VSIIX)09/19/2014 [MF]					
Ernst & Young 401(k) ⇒ VANGUARD TARGET 2035 09/19/2014 [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ VANGUARD TARGET 2050 09/19/2014 [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ VANGUARD TARGET 2060 09/19/2014 [MF]		\$1 - \$1,000	Tax-Deferred		
FIDELITY CAPITAL & INCOME [MF]	SP	\$1 - \$1,000	Tax-Deferred		
FIDELITY FOCUSED STOCK FUND [MF]	DC	\$1,001 - \$15,000	Dividends, Interest	\$201 - \$1,000	\$1 - \$200
FIDELITY GOVERNMENT CASH RESERVES [MF]	SP	\$1 - \$1,000	None		
FIDELITY NEW MARKETS INCOME [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
FIDELITY SELECT GOLD [MF]	SP	\$1 - \$1,000	Tax-Deferred		
FIDELITY SELECT TECHNOLOGY [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
HCA 401(k) ⇒ 25-To-Go Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
HCA 401(k) ⇒ 35-To-Go Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		
HCA 401(k) ⇒ Commodities Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
HCA 401(k) ⇒ Emerging Market Stock Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
HCA 401(k) ⇒ High Yield Corporate Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
HCA 401(k) ⇒ Large Company Growth Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
HCA 401(k) ⇒ Large Company Value Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
HCA 401(k) ⇒ Real Estate Investment Trust Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
HCA 401(k) ⇒ Small Company Growth Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
HCA 401(k) ⇒ Small Company Value Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Intuitive Surgical, Inc. (ISRG) [ST]	DC	\$1,001 - \$15,000	None		
NH Portfolio 2027 ⇒ NH PORTFOLIO 2027 (FIDELITY FUNDS) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Novavax, Inc. (NVAX) [ST]	DC	\$1 - \$1,000	None		
Novavax, Inc. (NVAX) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Rental, Austin, TX [RP] LOCATION: Austin / Travis, TX, US		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$5,001 - \$15,000
Rollover IRA ⇒ FIDELITY CAPITAL & INCOME [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY CONTRAFUND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY EXPORT & MULTINATIONAL [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY GOVERNMENT CASH RESERVES [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY LEVERAGED COMPANY STOCK [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rollover IRA ⇒ FIDELITY NEW MARKETS INCOME [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY SELECT CHEMICALS [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY SELECT DEFENSE & AEROSPACE [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY SELECT ENERGY [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY SELECT HEALTH CARE SRVC [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY SELECT NATURAL GAS [MF]		\$1,001 - \$15,000	Tax-Deferred		
SPDR Select Sector Fund - Technology (XLK) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TrovaGene, Inc. (TROV) [ST]	DC	\$1 - \$1,000	None		
TWEEDY BROWNE GLOBAL VALUE FUND [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
HCA	Salary	\$328,615.00	\$273,456.00
Apple	Spouse salary	N/A	N/A
New Payroll Associates	Spouse salary	N/A	N/A
Breatherock Group	salary	\$9,700.00	\$17,730.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	PNC	July 2013	Mortgage on home, Austin, TX	\$250,001 - \$500,000
JT	PNC	June 2016	Mortgage on rental, Austin, TX	\$250,001 - \$500,000
	San Antonio Credit Union	September 2014	Car loan	\$15,001 - \$50,000
	Chase	Jan 2011	Credit card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Central Health (uncompensated)

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">Ernst & Young 401(k)HCA 401(k)NH Portfolio 2027 LOCATION: NHRollover IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Julie Lynn Oliver , 05/15/2018